
STRATEGIC INITIATIVES PRIORITIZATION

(Approved by the Board of Governors March 21, 2003)

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M.15 - MCLE - Online compliance	3
M.16 - MCLE - Increase provider fees	3
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STRATEGIC INITIATIVES – PRIORITIZATION

Name and Brief Description	Purpose	Priority*	Comments	General Cost Estimates
MEMBERS				
M.1 - Member Service Center - (In 2002, this initiative was considered by the Board but was not funded). (Green)	<ul style="list-style-type: none"> Provide a single source first contact point for members who seek assistance and information from the State Bar. Currently, members have difficulty accessing resources within the Bar. 	2	Work up costs for the 2005 Budget Cycle	New Program (General Fund) - \$750,000 per annum
M.2 – Business plans with other entities, such as local bars, and service providers, such as insurance providers. (Roeca)	<ul style="list-style-type: none"> With the prospect of stabilized funding from the Legislature, additional revenue sources are needed for new initiatives 	1	Non-Dues Revenue Sub-Committee – ongoing insurance initiative	N/A (Long-range)
M. 3 – Solo/Small Firm initiatives (See, M.2, M.5, M.18 – 24) (Heiting)	<ul style="list-style-type: none"> Better address the needs of solo and small firm practitioners, two groups with high numbers of complaints against them. 	2	Related to ongoing programs: Non-Dues Revenue Insurance issues research; LAP, MCLE, Technology Upgrades	\$ TBD
M.4 - Web site hosting of Bar family entities and business entities. (McLeod)	<ul style="list-style-type: none"> Additional revenue source, strengthen relationship with other entities 	Not Prioritized	Folded into initiative M. 23 – that was renamed to include online & website capability/ policy issues for services to the membership	See. M.23
M.5 - LAP and Discipline System Oversight (Heiting)	<ul style="list-style-type: none"> To ensure that the Lawyer Assistance Program and the Discipline system are performing the intent of the legislation creating the programs 	2	LAP operational	Discipline (General Fund); LAP Fund Ongoing
M.6 – Mediation (Heiting)	<ul style="list-style-type: none"> To resolve low level disciplinary matters without the involvement 	2	Explore possible volunteer component and revisit	OCTC (General Fund) \$TBD

* 1 = HIGH; 2 = MEDIUM; 3 = LOW

STRATEGIC INITIATIVES – PRIORITIZATION

Name and Brief Description	Purpose	Priority*	Comments	General Cost Estimates
M.7 - Career Planning for Lawyers - addressing the needs of unemployed attorneys (Walker)	<ul style="list-style-type: none"> To assist newly admitted attorneys and attorneys who have been laid off on career planning by introducing them to job opportunities/ people for the practice of law or to pursue other related careers which do not include the practice of law 	2	Need more specific information re staff time allocation and additional costs	CYLA \$TBD
M.8 - “Closing the Doors” -- addressing the needs of older attorneys as they retire from the practice of law (Walker)	<ul style="list-style-type: none"> Provide support, resources and guidance to older attorneys on specific issues that would arise in the closing of a law practice 	2	Need more specific information re staff time allocation and additional costs	Senior Lawyers Committee \$TBD
M.9 - Diversity Campaign--Increasing Diversity in the Profession (Roeca)	<ul style="list-style-type: none"> To educate the bar and the profession on the value of diversity in the profession and to offer various projects that further this goal 	1		Program Development (General Fund); Elimination of Bias Fund - Ongoing
M.10 - Pro Hac Vice Initiative - Information outreach to state courts on <i>pro hac vice</i> requirements (McLeod)	<ul style="list-style-type: none"> To educate judiciary on the propriety of admitting an out of state attorney to a California state court proceeding. 	Not Prioritized	The committee directed staff to develop as agenda items within the inventories of the pertinent Board Committee(s) --- (e.g., PPBD for planning, budget preparation, and program implementation, and or to the appropriate Performance Oversight Committee.)	
M.11 - Pro Hac Vice and Out-of-State Attorney Arbitration Counsel Programs - Fee Increase. (McLeod)	<ul style="list-style-type: none"> Provide funding for office initiatives such as online search of applications filed, notification to courts of applications filed by out-of-state attorney, and other Office of Certification programs. 	Not Prioritized	"	

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STRATEGIC INITIATIVES – PRIORITIZATION

Name and Brief Description	Purpose	Priority*	Comments	General Cost Estimates
M.12 - Out-of-State Attorney Arbitration Counsel Program - Outreach to Arbitral Organizations and the Supreme Court. (McLeod)	<ul style="list-style-type: none"> To impress upon the Arbitral Organizations the importance of compliance with the certificate requirement 	Not Prioritized	"	
M.13 - ADR - Outreach to quasi-judicial organizations seeking expansion of OSAAC requirements to include mediation and other quasi-judicial proceedings. (McLeod)	<ul style="list-style-type: none"> To create uniformity in the requirements for out-of-state attorneys appearing in quasi-judicial proceedings while in California. 	Not Prioritized	The committee directed staff to develop these items within the inventories and as agenda items of the pertinent Board Committees --- PPBD for planning, budget preparation, and program implementation, and or to the appropriate Performance Oversight Committee.	
M.14 - Foreign Legal Consultant Program - Allow Registered Foreign Legal Consultant to participate in Client Security Fund. (McLeod)	<ul style="list-style-type: none"> To encourage foreign attorneys to register as foreign legal consultants. 	Not Prioritized	"	
M.15 - Minimum Continuing Legal Education Program - Online Compliance (Submitted by Office of Certification and also included w/ "IT" initiatives – See M. 20) (McLeod)	<ul style="list-style-type: none"> Allow the member to show compliance with the MCLE requirement online. 	Not Prioritized	"	
M.16 - Minimum Continuing Legal Education Program - Increase provider fees. (McLeod)	<ul style="list-style-type: none"> To adjust fees to reflect increased costs of maintaining the MCLE program since last change in 1995. Provide funding for Office initiatives such as online compliance. 	Not Prioritized	"	

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STRATEGIC INITIATIVES – PRIORITIZATION

Name and Brief Description	Purpose	Priority*	Comments	General Cost Estimates
M.17 - Minimum Continuing Legal Education Program - Improve quality of education. (McLeod)	<ul style="list-style-type: none"> Develop standards and performance measures for providers. 	Not Prioritized	"	
M.18 - Virtual Exhibit Hall Page on Web site (McLeod) (See M.23)	<ul style="list-style-type: none"> To provide a Location on the web site for commercial venders to advertise their wares 	Not Prioritized	Folded into initiative M. 23 – that was renamed to include online & website capability/ policy for services to the membership	See. M.23
M.19 - Online payment capability (McLeod) (See M.23)	<ul style="list-style-type: none"> To enhance member service and expand access to website. 	Not Prioritized	"	See. M.23
M.20 - Online MCLE compliance (McLeod) (See M.23) (1. Research and determine feasibility of online MCLE record-keeping for members – see also M.15)	<ul style="list-style-type: none"> To enhance member service and expand access to website. 	Not Prioritized	"	See. M.23
M.21 - Online address change capability (McLeod) (See M.23)	<ul style="list-style-type: none"> To enhance member service and expand access to website. 	Not Prioritized	"	See. M.23
M.22 - Online district page capability (McLeod) (See M.23)	<ul style="list-style-type: none"> To enhance member service and expand access to website. 	Not Prioritized	"	See. M.23
M. 23 - Decisions on policy issues related to each initiative to be concluded in sufficient time to meet the implementation deadline for each initiative. <u>Increase Online & Website Capability/Policy for Services to the Membership</u> (McLeod)	<ul style="list-style-type: none"> To enhance member service and expand access to website: Greater and better institutional responsiveness to issues. 	1	Renamed to include online & website capability/ policy for services to the membership	IT (General Fund); Discipline Fund Ongoing \$TBD

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STRATEGIC INITIATIVES – PRIORITIZATION

Name and Brief Description	Purpose	Priority*	Comments	General Cost Estimates
M.24 - Increase website advertising revenues (McLeod) (See M.23): 1. Amend website advertising policy. 2. Implement comprehensive program to maximize website advertising revenues.	<ul style="list-style-type: none"> To enhance member service and increase Bar non-dues revenue. 	Not Prioritized	Folded into initiative M. 23 – that was renamed to include online & website capability/ policy for services to the membership	See. M.23
M.25 – Ethics School in Lieu of or in Addition to Sanctions in Trial Court (Heiting)	<ul style="list-style-type: none"> To Promote civility, professionalism, and higher ethical standards within the profession 	1	1.Requires Legislative change 2.Local Bar handles “Ethics School”	Need to explore Ethics School option w/the Judicial Council \$TBD
PUBLIC				
P.1 - Disciplinary Alternate Dispute Resolution (See M.6)	<ul style="list-style-type: none"> To find alternate means of disposing of complaints received by the State Bar 	Not Prioritized	(Same as M.6)	
P.2 - Fee Arbitration	<ul style="list-style-type: none"> To Facilitate an expeditious low cost resolution of fee disputes between attorneys and clients. 	Not Prioritized	Existing statutory program - B&P Code § 6200	
P.3 - Enhancement of Public Information Function; Explore the feasibility of enhancing the Bar’s public information activities & ensure BOGs have talking points on issues they will be addressing on behalf of the Bar. [See also S.6. below]	<ul style="list-style-type: none"> Ensure the Bar has the capacity to respond immediately when appropriate and to be proactive in educating the public about the State Bar and its work, and Board members are educated about the message they should be conveying before they speak on behalf of the Bar. 	Not Prioritized	Combined w/S.6	
P.4 - Legal Services to Moderate Income – Enhancing services through LRS programs	<ul style="list-style-type: none"> To enlist assistance and resources of local bars and lawyer referral services to increase access to legal services for moderate income clients 	Not Prioritized		

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STRATEGIC INITIATIVES – PRIORITIZATION

Name and Brief Description	Purpose	Priority*	Comments	General Cost Estimates
P.5 - Indigent Accused – standards to ensure effective, quality representation by court appointed attorneys	<ul style="list-style-type: none"> To address inconsistencies in indigent accused programs by developing standards for representation, attorney participation, and program administration 	Not Prioritized	Return to Standing Committee on the Delivery of Legal Services (SCDLS) for additional research	
P.6 - Representation of low and middle-income persons through "Law-Cal"	<ul style="list-style-type: none"> The Law-Cal would be similar to Medi-Cal wherein the attorney would be paid a modest fund for preparation of documents, appearances. 	Not Prioritized	Refer to Standing Committee on the Delivery of Legal Services (SCDLS) for additional research	
STAKEHOLDERS				
S.1 - Joint planning meetings & information sharing with key stakeholders: the Judicial Council, key voluntary bar associations and other state mandatory bar associations.	<ul style="list-style-type: none"> Monitor the trends and initiatives of the other Judicial Branch agency, the state voluntary bar organizations and other state mandatory bars as they relate to access to justice, governance, member communications and benefits 	Not Prioritized	Related to the Role and Workplan of Stakeholder Relations Committee	
S.2 - Stakeholder Outreach Schedule - Develop & implement regular schedule of meetings for the Bar w/external stakeholders.	<ul style="list-style-type: none"> Ensure improved ongoing communication with all-important stakeholders. 	Not Prioritized	"	
S.3 - State Bar Reference Guide - Develop reference guide for list of contacts for the State Bar.	<ul style="list-style-type: none"> Reference Guide could be used with many key stakeholders, including members of the legislature, the administration, judges, and others who have reason to refer people to the Bar, or contact Bar offices. 	Not Prioritized	"	

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STRATEGIC INITIATIVES – PRIORITIZATION

Name and Brief Description	Purpose	Priority*	Comments	General Cost Estimates
S.4 - Eadie Education Process – To ensure understanding of and support for the new Governance process by State Bar’s sub-entities (VIC)	<ul style="list-style-type: none"> The purpose of this effort would be to ensure consistent programming throughout the entire State Bar organization while limiting volunteer frustration with programming limitations resulting from political and litigation based restrictions and lack of understanding of the Eadie model. 	<p align="center">Not Prioritized</p>	<p>Related to the Role and Workplan of Stakeholder Relations and PPDB Committees</p>	
S.5 - Work with Local Bars - Dialogues on Freedom (Walker) <ul style="list-style-type: none"> Board members conduct district meetings, attend swearing-in ceremonies, and otherwise <u>Board Members make State Bar Foundation Grant Presentations</u> 	<ul style="list-style-type: none"> Coordinate with CYLA and with local bars to help distribute model materials for presentations in school Increase communication and coordination with local bars and local legal community. 	<p align="center">1</p>	<p>Target Date - 2004</p>	<p>BOG (General Fund); CYLA (General Fund)</p> <p align="center">\$TBD</p>
S.6 - Public Outreach (Green) <ul style="list-style-type: none"> Seniors and the Law – Publish in May Speaker referral service Communication kits <u>Local Media</u> <ul style="list-style-type: none"> <u>Providing Recognition from the Bar</u> <u>Point Person for the Bar</u> <u>Participation in talk shows</u> 	<ul style="list-style-type: none"> Use as focus for outreach presentations Coordinate requests for Board member presentations to community groups and conduct outreach to encourage groups to include a State Bar speaker Developed for Board members to support outreach efforts 	<p align="center">1</p>	<p>Combined w/ P.3 - Enhancement of Public Information Function</p>	<p>IT (General Fund); Bar Communications (General Fund); (Elimination of Bias Fund?)</p> <p align="center">\$TBD</p>

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STRATEGIC INITIATIVES – PRIORITIZATION

Name and Brief Description	Purpose	Priority*	Comments	General Cost Estimates
S.6 - Public Outreach (Cont'd) <ul style="list-style-type: none"> Enhancement of Public Information Function; Explore the feasibility of enhancing the Bar's public information activities & ensure BOGs have talking points on issues they will be addressing on behalf of the Bar. [See also P.3 below] 	<ul style="list-style-type: none"> Ensure the Bar has the capacity to respond immediately when appropriate and to be proactive in educating the public about the State Bar and its work, and Board members are educated about the message they should be conveying before they speak on behalf of the Bar. 			
S.7 - Legislative Outreach and Activities	<ul style="list-style-type: none"> Request Board members to meet with legislators in their district, providing copies of consumer education pamphlets, new access to justice report, and the brief reference guide to the State Bar, and asking for their input, questions, and concerns 	3	Need implementation guidelines – Stakeholder Relations Committee	BOG (General Fund); Legislative Activities Fund \$TBD
S.8 - Increasing Access/Addressing Unauthorized Practice of Law (Roeca) <ul style="list-style-type: none"> Educate the public on the law Coordinate with local bars 	<ul style="list-style-type: none"> Through PSA's make the model PSA's available to local bars to add local referral numbers for legal services and LRS's; consider other public education efforts such as lawyer call-in programs, etc. 	1		Bar Communications (General Fund); Competence (General Fund); Program Development (General Fund)

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STRATEGIC INITIATIVES – PRIORITIZATION

Name and Brief Description	Purpose	Priority*	Comments	General Cost Estimates
S.8 - Increasing Access/Addressing Unauthorized Practice of Law (Cont'd) <ul style="list-style-type: none"> ▪ Organize a symposium or roundtable discussion on UPL issues ▪ Coordinate with local bars, inviting legal services and pro bono representatives, unbundling advocates, self-help center staff, modest means project representatives, registered document preparers, etc 	<ul style="list-style-type: none"> ▪ Explore both the need for legal assistance and the harm caused by UPL 			\$TBD
OPERATIONAL				
O.1 - Developing board-friendly and simple financial reporting data (Capozzi)	<ul style="list-style-type: none"> ▪ To allow appropriate board and committee oversight to measure and monitor institutional (State Bar) financial well-being. 	1		Ongoing

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